Client Service Representative position open

Who is OnTrack WNC Financial Education & Counseling?
OnTrack WNC helps people achieve their money and housing goals so they can live out their values. We've been around for over 40 years and are committed to innovation. Our values include a supportive working environment, ongoing quality improvement, respect for our clients' wisdom, and meaningful diversity. We have a staff of 16.

What is the position?
Full-time (40 hours per week) Client Service Representative (CSR).

Who are we looking for?
We are looking for someone who can help us continue to improve how we serve people of color, and low-income people. Specifically, we are seeking candidates with cultural competency and lived experience within the African American community.

You will be trained on all aspects of the job. You will need the aptitude to learn both the technical aspects of the job (e.g., client screening and client management system) as well as the ability to communicate clearly and compassionately. Attention to detail and an organized work style are also a must.

As a Client Service Representative, what type of work will I be doing?
Acting as the initial point of contact for all incoming client calls, emails, and in-person inquiries, the CSR listens to client needs, screens clients according to procedures, and books them for the appropriate service. Additionally, the CSR conducts all client administrative follow-up, intake, and support prior to the client attending the session. Because of the highly detailed and nuanced nature of our services, the CSR implements a wide array of screening and client support processes that serve as the foundation for the agency's overall service delivery.

Why work at OnTrack WNC?
You will learn a lot and grow professionally while working with people who care about their jobs and do them well. Starting salary ranges from 12.50 - $13.25 per hour based on experience plus healthcare (after three months) and 401(k) retirement (after one year).

Job Description
The CSR, a member of the Client Service Department, is the initial point of contact with our clients and must exhibit exemplary customer service skills presenting our services with professionalism, empathy, and kindness. We regard the CSR as the Director of First Impressions because the client's overall experience is shaped during their first contact with the agency.

The CSR must have the ability and desire to relate to clients from a wide variety of backgrounds and life experiences, figure out their particular needs, screen them according to agency procedures, and efficiently book them for the appropriate service. This individual must meet professional standards in attitude, knowledge, and skills. Candidate must possess the ability to problem solve, handle a high volume of phone calls, and work in a fast-paced environment. The CSR ensures quality service by *listening to clients*, adhering to agency policies and procedures, assisting with data collection and reporting, and fostering continuous improvement.

Teamwork is integral to the success of the Client Service Department; candidate must be able to communicate within a team environment in a personable and friendly manner, exhibit flexibility and desire to create outcomes best for the agency/clients. Must dress neatly and present in a warm, caring manner. Counselor must be organized and efficient.

Job Duties

The CSR performs the following duties on a regular basis:

1. **Answer a high volume of incoming telephone calls, book clients, make reminder calls/send reminder emails, and manage daily flow of incoming clients.**
    - Have strong understanding of all areas of OnTrack WNC and be able to share this information with callers / clients as appropriate by following detailed screening and booking procedures.
    - Listen to caller's needs; determine type of appointment needed, refer caller to counselor and /or other agency, and mail / email / fax appointment worksheet packets to clients.
    - Notify counselors of schedule changes (especially when at satellites).
    - Welcome persons walking in and address their needs or refer them to the appropriate resource.
    - Conduct reminder calls/emails to clients.
    - Prepare and provide intake materials for appointments.
2. **General Administrative Tasks: Pull credit report, handle mail, organize/order brochures.**
    - Pull credit reports for clients.
    - Organize office materials and supplies and assist in maintaining supply of brochures and materials.
    - Post mail and scan client files.
    - Assist staff with special events and mailings.
    - Provide departmental support to staff members as needed to perform their administrative duties.
    - Data input and tracking
3. **Participate as an active and engaged member of the staff: share and accept ideas and feedback**
    - Attend all Client Service Team meetings and staff meetings, actively participates, provides thoughtful input, and makes informal presentations as assigned;
    - Participates in group and independent projects to do research, develop reference documents for use by the team, or otherwise improve services; and
    - Thinks broadly and creatively about how to enhance our services.
4. **Take ownership of work and communication:**
    - Strive for excellence;
    - Learn procedures precisely and incorporates new knowledge into work;
    - Provide open, honest, and direct communication to supervisors and coworkers;
    - Provide timely and thoughtful responses to emails;
    - Take full ownership of work and ask for help when needed; and
    - Maintain an organized work system to effectively manage job responsibilities.

Application Instructions

Cover Letter and Resume: Cover letter must accompany the resume.

Here's what we are looking for in your cover letter:

- List the experience you've had that is most relevant to this job and your cultural competency and/or lived experience within the African American community if applicable. Help us make the connection between what you have done and what we're looking for.
- Tell us why you are interested in this job with OnTrack WNC.

Here's what we are looking for in your resume:

- Elements of previous work, school, or volunteer experience that will help you succeed in this job.

Submission: Email cover letter and resume to Emily Matthews at emilym@ontrackwnc.org.

Subject line: "Client Service Representative – Your Last Name". No phone or drop-in inquiries please.

Deadline: Friday, October 25 at 5:00. Interviews will be scheduled as applications are received and until the position is filled.